MILLAR FINANCIAL
An affiliate of Wilde Wealth Management Group

What to Bring to your First Appointment

Please bring any of the following documents that pertain to your situation. Photocopies will be made and the originals will be returned back to you at our next meeting.

Cash Flow & Debt:

- ☐ Budget (if you have one)
- ☐ Income Statements
- ☐ Monthly Expenses
- ☐ Mortgage Statements
- ☐ Credit Card Statements
- ☐ Other Loans - Car, School, Personal, Lines of Credit

Retirement Planning:

- ☐ Latest Statements from IRA's, 401(k)s, Roth's and other qualified retirement plans
- ☐ Deferred Compensation and stock option agreements
- ☐ Pension/profit sharing plans
- ☐ Social Security statements
- ☐ Business documents (buy-sell agreements, etc.)

Investments

- ☐ Latest Statements from brokerage accounts, mutual funds, etc.
- ☐ Annuity Contracts
- ☐ Checking and Savings accounts and Certificate of Deposit Statements
- ☐ Real estate purchases, escrow and loan documents

Tax Planning

- ☐ Personal tax returns for the last two years
- ☐ Business tax returns for the last two years

Risk Management

- ☐ Life insurance policies and recent statements
- ☐ Disability insurance policies
- ☐ Long-term care policies
- ☐ Medical Insurance and HSA information
- ☐ Home and Auto insurance policies
- ☐ Employee benefits handbook

Estate Planning

- ☐ Wills and Trust documents
- ☐ Other estate planning documents such as Power of Attorney, etc.

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